Planned (Target) Allocation Shifts - 2016 Canadian Institutional Investors

January 11, 2017

Executive Summary:

This report provides detailed information on the institutional investment market in Canada, including helpful benchmark data on planned allocation shifts across channels such as corporate pensions, public or industry pensions, and endowments and foundations.

Methodology:

This research is based on personal interviews conducted from July through October 2016 with 214 of the largest tax-exempt funds in Canada. Total assets exceed $1 trillion. Senior fund professionals were asked to provide quantitative and qualitative evaluations of their investment managers, qualitative assessments of those managers soliciting their business, and detailed information on important market trends.

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